



Filing ID #10023953

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Stevan Michael Porter  
**Status:** Congressional Candidate  
**State/District:** VA11

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 06/21/2018  
**Period Covered:** 01/01/2017– 06/8/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
607 Center St [RP]  LOCATION: Herndon, VA, US	SP	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Congressional Federal Credit Union Accounts [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity - Oracle 401k ⇒ DODGE & COX INTL STK [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity - Oracle 401k ⇒ TD36 - US SMID CAP VAL SP [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity - Oracle 401k ⇒ VANG 500 INDEX TRUST [MF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch IRA ⇒ Bank of America NA RASP - Cash [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Netflix, Inc. (NFLX) [ST]	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Oracle Corporation (ORCL) [ST] DESCRIPTION: Employee Stock Purchase Plan		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab IRA ⇒ CARILLON SCOUT INTL FD I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ COLUMBIA ACORN FUND CL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ PARNASSUS CORE EQTY FD INV [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ PIMCO Total Return Fund Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	None		
Wells Fargo - Dewberry 401k ⇒ AMERICAN FUNDS GROWTH FUND OF AMERICA R4 RGAEX [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Wells Fargo - Dewberry 401k ⇒ ARTISAN INTERNATIONAL FUND (INVESTOR) ARTIX [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Wells Fargo - Dewberry 401k ⇒ BLACKROCK EQUITY DIVIDEND INST MADVX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Dewberry 401k ⇒ FIDELITY ADVISOR SMALL CAP I FSCIX [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Wells Fargo - Dewberry 401k ⇒ LOOMIS SAYLES INVEST GRADE BOND (Y) LSIIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Dewberry 401k ⇒ VANGUARD INSTITUTIONAL INDEX I VINIX [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Oracle Corporation	Full Time Technical Support Engineer	\$39,950.04	\$100,368.83
Loudoun County Virginia	Part Time Instructor	\$2,142.72	\$4,480.74
Dewberry Consultants LLC	Spouse Salary	N/A	N/A
SCS Safety Health & Security Associates	Part Time Instructor	\$240.00	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	April 2017	Personal Loan - Debt Consolidation and Home Improvement	\$10,000 - \$15,000
JT	Congressional Federal Credit Union	February 2017	Car Loan	\$15,001 - \$50,000
	NAVIENT FEDERAL LOAN TRUST	March 1997	Student Loan Consolidation	\$50,001 - \$100,000
SP	Wells Fargo	January 2014	Mortgage on Rental Property	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Assistant Chief / Board of Directors	Loudoun County Volunteer Rescue Squad
Deputy Chief	Loudoun County Volunteer Rescue Squad
Independent Consultant	Life Leadership

**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

<ul style="list-style-type: none"> <li>o Fidelity - Oracle 401k</li> <li>o Merrill Lynch IRA (Owner: SP)</li> </ul>
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- Schwab IRA
- Wells Fargo - Dewberry 401k (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Mr. Stevan Michael Porter , 06/21/2018